ESO 209

CUSTOMERS & THEIR SUPERMARKETS IN TWO OHIO COMMUNITIES, 1974

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October, 1974

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Introduction

A food store customer survey conducted in the fall of 1974 included two communities of northern Ohio. The Hudson Community includes the village and surrounding township. The Stow Community includes that part of Stow north of Graham Road, essentially the northern half of Stow, which is adjacent to Hudson.

Questionnaires were sent by mail to 1,896 households, randomly chosen from a 1974 street directory. A total of 533 completed questionnaires were returned. Twenty-nine were not tabulated because of late arrival. The summary and analysis of the survey included 504 households--277 in Hudson and 227 in Stow. Of the questionnaires sent to a Hudson address, 30.3 percent were returned; 25.7 percent were returned from Stow, for a total return rate of 28.1 percent. There was no follow-up letter to those who did not respond to the first mailing.

Those who did the food buying were asked to respond to where they shopped, what was important to them when selecting a food store, family income, age of the food shopper, food expenditure per week, size of family, suggestions for improvement of food stores, the importance of current food issues, concerns about food quality and freshness, and adjustments in food buying as a result of high rates of inflation. They were also asked to rate various aspects of stores in which they shopped.

The survey objectives were to identify priority considerations customers may have for selecting a food store, to explore areas of similarities and differences of two adjacent communities, to identify adjustments customers have made in food buying as a result of inflation and to identify other concerns about food which customers in this area may have at this time. No attempt is made to generalize this information to an area greater than the area surveyed.

Some of the information is summarized on a community basis to detect family size, income, and food buying differences. Most information is presented on the basis of the total trading area surveyed.

Appreciation is expressed to those individuals in both communities who were kind enough to return completed questionnaires, to Mary Martens and Margaret Danforth for their assistance in addressing and mailing the questionnaires, to Debbie Burbridge for assistance in summarizing the results and to Bobbi Riddle for typing my impossible scribbling.

Supermarkets traditionally have attracted customers who live relatively close to the store. This characteristic is true for the area surveyed, especially so in Stow.

Where Stow Customers Shopped

Sixty-four percent of Stow customers bought most of their food from three stores (Table 1). This is a not unusual concentration. In addition, another seven stores account for nearly all of the stores usually shopped. All of these stores are near the area surveyed. Taken together these stores account for over 98 percent of the customers in the area. Table 2 identifies other stores usually shopped with about the same results. When the stores usually shopped are combined with other stores shopped (Table 3) the results indicate that the three top stores are rather regularly exposed to most of the customers in the area.

Residents of Stow indicate their favorite meat stores (Table 4) are more numerous than where they buy most of their food with some 15 more stores identified in addition to those usually shopped. The most popular meat stores were still those identified as those they usually shopped. The major change was Cardinal, which moved from seventh on the general list to fourth for meats.

The major change for stores shopped for fruits and vegetables (Table 5) was the popularity of farm and produce markets in this early fall period. Fisher Fazio also shifted from fourth on the general, usually shopped list to third for stores shopped for fruits and vegetables.

Where Hudson Customers Shopped

The top three stores where Hudson customers usually shopped accounted for 83 percent of the residents (Table 6). This is an unusually high concentration, with Acme having a large share. Other stores frequently shopped added 19 more stores (Table 7). When these two lists are combined, five stores account for most of the food store activity for Hudson (Table 8).

Residents of Hudson indicate that choices for a meat store are more numerous and more dispersed (Table 9) than for general food purchases. Farm stands and produce markets appear as an additional choice for fresh fruits and vegetables for the fall period (Table 10).

TABLE 1

Stow (North of Graham Road)
227 Questionnaires

QUESTION 1. WHERE DO YOU BUY MOST OF YOUR FOOD?

		No. of Responses	Percent of Responses
1.	Click (Rte. 59)	60	26.4%
2.	Sparkle (Darrow Rd.)*	47	20.7
3.	Co-op (Stow)*	37	16.3
4.	Fazio (Bath Rd.)*	20	8.8
5.	Kroger (Stow-Kent)	19	8.4
6.	K Mart (Rte. 59)	13	5.7
7.	Cardinal (Darrow Road)	12	5.3
8.	Acme (Hudson)	9	4.0
9.	Acme (Cuyahoga Falls--2 stores)	6	2.6
10.	A & P (Stow-Kent)*	4	1.8
11.	Heinens (Aurora)	1	.4
12.	Kroger (Chapel Hill)	1	.4
13.	Remkers (Kent)	1	.4
14.	Stop & Shop (Solon)	1	.4

Total will add to more than 100% (223) questionnaires because of multiple responses.
*Includes a small number of stores at other locations.

TABLE 2
STOW CUSTOMERS

Question 2. What Other Store Do You Most Frequently Shop?

	No. of Responses	Percent of Responses
1. Click (Stow-Kent)	52	22.9
2. Co-op (Stow)	36	15.9
3. Sparkle (Stow)	30	13.2
4. Fazio (Bath Road)	24	10.6
5. K-Mart (Stow-Kent)	19	8.4
6. Kroger (Stow-Kent)	18	7.9
7. Cardinal (Hudson)	11	4.9
8. A & P (Stow-Kent)	8	3.5
9. Other Acme	7	3.1
10. Acme (Hudson)	5	2.2
11. Heinens (Aurora)	2	.9
12. Reinkers (Kent)	1	.4
13. All others*	12	5.3

*Ten of the 12 "others" were four convenience stores in the area.

TABLE 3
STORES SHOPPED (PRIMARY AND SECONDARY) BY STOW CUSTOMERS

	No. of Responses	Percent of Customers
1. Click (Stow-Kent)	112	49.3
2. Sparkle (Stow)	77	33.9
3. Co-op (Stow)	73	32.2
4. Fazio (Bath Road)	44	19.4
5. Kroger (Stow-Kent)	37	16.3
6. K-Mart (Stow-Kent)	32	14.1
7. Cardinal (Hudson)	23	10.1
8. Acme (Hudson)	14	6.2
9. Other Acme	13	5.7
10. A & P (Stow-Kent)	12	5.3
11. Heinens (Aurora)	3	1.3
12. Reinkers (Kent)	2	.9
13. Stop & Shop (Solon)	1	.4
14. Kroger (other)	1	.4
15. All others	12	5.3

TABLE 4

STOW CUSTOMERS

3. WHERE DO YOU BUY MOST OF YOUR MEATS?

	No. of Responses	% of Responses
Click (Stow-Kent)	49	21.6
Co-op (Stow)	48	21.1
Sparkle (Stow)	37	16.3
Cardinal (Hudson)	19	8.4
Fazio (Cuyahoga Falls)	15	6.6
Kroger (Stow-Kent)	11	4.8
K-Mart (Stow-Kent)	8	3.5
Acme (Cuyahoga Falls)	7	3.1
Acme (Hudson)	5	2.2
A & P (Stow-Kent)	4	1.8
Brenner Meats (Cuyahoga Falls)	3	1.3
Miracle Mart (Akron)	3	1.3
Marshalville Packing	2	.9
Ellet Meat Market	2	.9
Tony's Stow Market	2	.9
George's Meats	1	.4
Reinkers (Kent)	1	.4
Martindale Meats (Uniontown)	1	.4
Gourmet's Chalet (SugarCreek)	1	.4
Portage Frosted Foods	1	.4
Direct from Grower	1	.4
A & P (Cuyahoga Falls)	1	.4
Stop & Shop	1	.4
Custom Butcher (Suffield)	1	.4
Wayne Knoll Farms	1	.4
Acme (Akron)	1	.4
Akron Provision (Akron)	1	.4
Heinens (Aurora)	1	.4
Star Markets	1	.4

TABLE 5
STOW CUSTOMERS

4. WHERE DO YOU BUY MOST OF YOUR FRUITS AND VEGETABLES?

	No. of Responses	% of Responses
Click (Stow-Kent)	82	36.1
Sparkle (Stow)	32	14.1
Fazio (Cuyahoga Falls)	28	12.3
Co-op (Stow)	21	9.3
Kroger (Stow-Kent)	15	6.6
Farm Stands	11	4.8
Kreigers Market	10	4.4
Acme (Hudson)	8	3.5
K-Mart (Stow-Kent)	8	3.5
Cardinal (Hudson)	7	3.1
Acme (Cuyahoga Falls)	6	2.6
Wheeler's Market	5	2.2
Stop and Shop	2	.9
LaKlords (Graham Road)	1	.4
Bissons (Akron)	1	.4
A & P (Kent)	1	.4
A & P (Cuyahoga Falls)	1	.4
A & P (Akron)	1	.4
Divitis (Akron)	1	.4
Heinens (Aurora)	1	.4
Parkers (Akron)	1	.4

TABLE 6
HUDSON CUSTOMERS
(277 Questionnaires)

Question 1. WHERE DO YOU BUY MOST OF YOUR FOOD?

		No. of Responses	Percent of Responses
1.	Acme (Hudson)	179	64.6
2.	Heinens (Aurora)	24	8.7
3.	Cardinal (Hudson)	22	7.9
4.	Sparkle (Twinsburg)	17	6.1
5.	Fazio (Bath Rd.)*	16	5.8
6.	Click (Rte. 59)		
7.	Stop 'N Shop (Solon)	4	1.4
8.	Pick 'N Pay (Northfield)*	3	1.1
9.	K-Mart (Stow-Kent)	2	0.7
10.	Co-op (Stow)	2	0.7
11.	Kroger (Stow-Kent)	1	0.4
12.	Sparkle (Streetsboro)	1	0.4
13.	A & P (Stow-Kent)	1	0.4
14.	Searcy (Hudson)	8	0.4

Total number of responses adds to more than 100 percent because of multiple responses.

*Includes a limited number of stores at other locations.

TABLE 7
HUDSON CUSTOMERS

Hudson (Village and Township)
277 Questionnaires

QUESTION 2. WHAT OTHER FOOD STORES DO YOU MOST FREQUENTLY SHOP?

		No. of Responses	Percent of Responses
1.	Cardinal (Hudson)	59	21.3 %
2.	Acme (Hudson)	56	20.2
3.	Heinen (Aurora)*	47	17.0
4.	Sparkle (Twinsburg)*	28	10.1
5.	Fazio	24	8.7
6.	A & P (Stow-Kent)	9	3.2
7.	Searcy (Hudson)	8	2.9
8.	Click (Stow-Kent)	7	2.5
9.	Co-op (Stow)	6	2.2
10.	Lawsons (Hudson)	5	1.8
11.	Stop-N-Go (Hudson)	4	1.4
12.	Convenient (Hudson)	4	1.4
13.	K Mart (Rte. 59)	4	1.4
14.	Stop 'N Shop (Solon)	3	1.1
15.	Kroger*	2	.7
16.	Bisson (Akron)	2	.7
17.	Star (Akron)	1	.4
18.	Bi-Rite (Lyndhurst)	1	.4
19.	Roadside Market	1	.4
20.	Pick-N-Pay (Solon)	1	.4
21.	Farm Boy (Rte. 8)	1	.4
22.	Vlasaks (Northfield)	1	.4

TABLE 8
STORES SHOPPED (PRIMARY & SECONDARY) BY
HUDSON CUSTOMERS

		Number of Respondents	Percent of Respondents
1.	Acme (Hudson)	235	84.7%
2.	Cardinal (Hudson)	81	29.2
3.	Heinen (Aurora)	71	25.6
4.	Sparkle (Twinsburg)*	45	16.2
5.	Fazio (Bath Road)*	40	14.4
6.	Click (Stow-Kent)	13	4.7
7.	A & P (Stow-Kent)*	10	3.6
8.	Searcy (Hudson)	9	3.2
9.	Co-op (Stow)	8	3.5
10.	Stop 'N Shop (Solon)*	7	2.5
11.	K Mart (Stow-Kent)	6	2.2
12.	Lawsons (Hudson)	5	1.8
13.	Others	20	7.2

*Primary Locations

TABLE 9
HUDSON CUSTOMERS

3. WHERE DO YOU BUY MOST OF YOUR MEATS?

	No. of Responses	% of Responses
Acme (Hudson)	147	53.1
Heinens (Aurora)	41	14.8
Cardinal (Hudson)	22	7.9
Fazio (Cuyahoga Falls)	18	6.5
Sparkle (Twinsburg)	17	6.1
Searcy's (Hudson)	9	3.2
Click (Stow-Kent)	4	1.4
Farm Boy (Northampton)	3	1.1
Copley Packing (Akron)	2	.7
Stop & Shop (Solon)	2	.7
Pick & Pay (Solon)	2	.7
K-Mart (Stow-Kent)	2	.7
Bugs Side of Beef	1	.4
Portage Frosted Foods (Ravenna)	1	.4
Co-op Cuyahoga Falls	1	.4
Fazio (Southgate)	1	.4
Direct from Farm	1	.4
Sutile Company	1	.4
Winchell Road Packers(Mantua)	1	.4
Reiders (Solon)	1	.4
Niuman Meats (Minerva)	1	.4
Dares Handy Store	1	.4
Elmer's Meats (Cleveland)	1	.4
Star Market (Akron)	1	.4
Homestead Products	1	.4
Convenient Food Stores (Hudson)	1	.4
Aurora Farms (Aurora)	1	.4
Yoders (Sugar Creek)	1	.4
A & P (Stow)	1	.4
A & P (Streetsboro)	1	.4

TABLE 10
HUDSON CUSTOMERS

4. WHERE DO YOU BUY MOST OF YOUR FRUITS & VEGETABLES?

	No. of Responses	% of Responses
Acme (Hudson)	164	59.2
Heinens (Aurora)	33	11.9
Farm Stands	30	10.8
Fazio (Cuyahoga Falls)	18	6.5
Cardinal (Hudson)	13	4.7
Sparkle (Twinsburg)	13	4.7
Click (Stow)	7	2.5
Stop 'N Shop (Solon)	5	1.8
K-Mart (Stow-Kent)	2	.7
Wheeler's Market	2	.7
Kroger (Stow-Kent)	1	.4
Bisson (Akron)	1	.4
A & P (Stow)	1	.4
Pick 'N Pay	1	.4
Casey's Market	1	.4
Footes Market (Canal Road)	1	.4

Who Does the Food Shopping ?

Not unexpectedly, wives are indicated as the person doing the food shopping in both areas. The two areas are different in the proportion of husbands and wives sharing the shopping (Table 11). Of the Stow households, 22.6 percent indicate that both husband and wife do the shopping. We can only speculate on why there is a greater degree of sharing for the Stow area. One such speculation might be that more of the men in Hudson have jobs that tend to keep them away from home for longer periods.

Size of Family, Age & Income

Hudson family size was larger than that in Stow. Average family size in Hudson was 3.86 compared with 3.55 for Stow (Table 12).

A significant difference in age distribution of families was also indicated (Table 13). In Stow, 28.4 percent of the food shoppers were below 30 years of age, compared with 11.9 percent in Hudson. An influence in this distribution might be the larger proportion of apartments available in Stow for younger and new family households.

A significant difference also appears in the distribution of family income in the two areas (Table 14). Stow has an estimated average family income of $14,720 (just above state average), while Hudson has an estimated average income of $20,900. Over 50 percent of the households in Hudson have family incomes above $20,000.

Grocery Store Expenditures

The income effect is evident in the distribution of food store expenditures in the two communities (Table 15). Of the Hudson customers, 38.7 percent spend over $50 per week in grocery stores compared with 18.5 percent for Stow. The average weekly food store expenditure for Hudson residents is $49.96, for Stow $37.08. Some of this difference is due to family size. On a per person basis, weekly food store expenditures for Hudson is $12.47 compared with $10.21 for Stow (Table 16).

Distance Home to Store

Only Sparkle (Stow) is within one mile of residents of the area of Stow which was surveyed (Table 17). To shop at Fazio, all customers from Stow must drive over two miles, and about half of Fazio customers from Stow drive over five miles. A much larger proportion of Hudson customers drive over five miles (26.4 percent) to shop compared with 13.1 percent of Stow customers.

TABLE 11

WHO DOES THE FOOD SHOPPING?

	Percentage		
	Hudson Customers	Stow Customers	Total
WIFE	86.3	73.0	80.3
HUSBAND	3.6	3.5	3.6
BOTH	9.4	22.6	15.3
OTHER	.7	.9	.8

TABLE 12

HUDSON CUSTOMERS

NUMBER IN FAMILY

No. in Family	No. of Families	% of Families
1	7	2.52
2	59	21.29
3	40	14.44
4	65	23.66
5	67	24.18
6 or more	37	13.35
No response	2	.72

Average Family Size -- 3.86

STOW CUSTOMERS

NUMBER IN FAMILY:

Number in Family	No. of Families	% of Families
1	3	1.32
2	54	23.89
3	58	25.66
4	61	26.99
5	26	11.50
6 or more	24	10.61

Average Family Size: 3.55

TABLE 13

AGE OF PERSON DOING FOOD SHOPPING

Age Group	Percentage Hudson Customers	Stow Customers	Total
Under 30 years	11.9	28.4	19.3
30 - 45 years	48.0	40.0	44.4
46 - 60 years	31.8	24.0	28.3
Over 60 years	8.3	7.6	8.0

TABLE 14

HUDSON CUSTOMERS

FAMILY INCOME

Family Income Per Year	No. of Families	% of Families
Under $4,000	1	.36
$4 - $8,000	7	2.52
$8 - $12,000	18	6.49
$12 - $16,000	32	11.55
$16 - $20,000	57	20.57
Over $20,000	150	54.15
No Response	12	4.33

Estimated Average Family Income -- $20,900

STOW CUSTOMERS

FAMILY INCOME

Family Income Per Year	No. of Families	% of Families
Under $4,000	5	2.21
$4,000 - 8,000	17	7.52
$8,000 - 12,000	46	20.35
$12,000 - 16,000	61	26.09
$16,000 - 20,000	51	22.56
Over $20,000	42	18.58
No response	4	1.76

Estimated average family income $14,720

TABLE 15

HUDSON CUSTOMERS

FAMILY FOOD STORE EXPENDITURES PER WEEK

Family Expenditures Per Week	No. of Families	% of Families
Less than $11	1	.36
$11 - $20	10	3.61
$21 - $30	33	11.91
$31 - $40	42	15.61
$41 - $50	72	25.99
$51 - $60	39	14.07
$61 - $70	19	6.85
$71 - $80	21	7.58
Over $80	28	10.10
No response	12	4.13

Average Weekly Food Store Expenditure -- $49.96

STOW CUSTOMERS

FAMILY FOOD STORE EXPENDITURES PER WEEK

Family Expenditures Per Week	No. of Families	% of Families
$11 - 20	6	2.65
$21 - 30	51	22.56
$31 - 40	58	25.66
$41 - 50	60	26.54
$51 - 60	19	8.40
$61 - 70	12	5.30
$71 - 80	6	2.66
Over $80	5	2.21
No Response	5	2.21

Average Weekly Food Store Expenditure: $37.08

TABLE 16

HUDSON CUSTOMERS

FOOD STORE EXPENDITURES PER PERSON

Expenditures Per Person	No. of Families	% of Families
Less than $10	35	12.63
$10 - $15	147	53.06
$16 - $20	55	19.85
$21 - $25	19	6.85
Over $25	6	2.16
No response	14	5.05

Average expenditure per person: $12.47

STOW CUSTOMERS

FOOD STORE EXPENDITURE PER PERSON:

Expenditures Per Person	No. of Families	% of Families
Less than $10	35	15.48
$10 - 15	147	65.04
$16 - 20	34	15.04
$21 - 25	5	2.21
No Response	5	2.21

Average expenditure per person: $10.21

TABLE 17

HUDSON CUSTOMERS

DISTANCE FROM HOME TO STORE USUALLY SHOPPED

Home to Store	Percent of Customers					
Miles	Hudson Total	Acme	Heinen	Cardinal	Sparkle	Other
Less than 1	16.7	20.8	0.0	40.9	0.0	2.7
1.0 - 1.9	25.3	36.1	0.0	27.3	0.0	2.7
2.0 - 2.9	12.8	17.5	0.0	4.5	14.3	2.7
3.0 - 4.9	18.7	17.5	0.0	13.5	47.6	8.1
5.0 - 6.9	10.1	20.8	20.0	13.5	33.3	21.6
7 and Over	16.3	1.6	80.0	0.0	4.8	62.2

To shop at Sparkle customers in Hudson must drive more than two miles.
To shop at Heinens customers in Hudson must drive more than five miles.
40.9 percent of Cardinal customers live less than one mile from store.
26. 4 percent of Hudson customers drive more than five miles to store usually shopped.

STOW CUSTOMERS

DISTANCE FROM HOME TO STORE USUALLY SHOPPED

Home to Store	Stow	Percent of Customers							
Miles	Total	Click	Sparkle	Co-op	Fazio	Kroger	K-Mart	Cardinal	Other
Less than 1	3.6	0.0	17.4	0.0	0.0	0.0	0.0	0.0	0.0
1.0 - 1.9	21.2	17.5	28.3	34.2	0.0	31.6	25.0	9.1	5.0
2.0 - 2.9	32.0	40.4	34.8	34.2	10.5	31.6	41.7	27.3	15.0
3.0 - 4.9	30.2	35.1	17.4	26.3	36.8	26.3	25.0	36.4	50.0
5.0 - 6.9	9.9	7.0	0.0	5.3	47.4	5.3	8.3	27.3	10.0
Over 7	3.2	0.0	2.2	0.0	5.3	5.3	0.0	0.0	20.0

To shop at Co-op, Click, Kroger, K-Mart and Cardinal all customers in area surveyed must drive over one mile.
To shop at Fazio all customers in area surveyed must drive over two miles.
Of the Stow customers surveyed, 13.1 percent drive more than five miles to the store.
There is no food store located in the part of Stow which was included in this survey.

Considerations Important to Customers in Selecting a Food Store

When answers to this inquiry were tabulated and classified into categories, the general price level was the single most important consideration. If customers indicated some qualification about price, such as reasonable or competitive, this was placed in a different classification. Likewise, if the customer specified low or lower prices this was, again, classified into a separate category. The ten most important considerations by all residents of the area are listed in order in Table 18. A different grouping of this information is shown in Table 19. In this instance, the considerations important in selecting a food store are grouped into four major classes--those having to do with the store itself; those having to do with employees and service; those having to do with pricing, promotion and advertising; and those having to do with products. When compared with former surveys in other geographical areas, there is much more emphasis on product related considerations in this survey.

When Hudson and Stow customer responses are tabulated separately (Table 20), some differences in considerations in selecting a food store appear. Stow customers place a somewhat greater emphasis on price, employee attitude, store atmosphere, store layout, price specials, well stocked shelves, parking, advertising, and one-stop shopping. Hudson customers tend to place more emphasis on cleanliness, quality of food, selection and variety, meat department, produce department, and services. This kind of analysis tends to measure the differences between stores shopped in the area. No firm conclusion can be established as to whether these differences are a result of divergence in customer values or differences in store performance in each area, or some combination of both. This analysis has some merit over a check-list type of response, as aggregate responses here tend to identify those categories which are of the most concern to the greatest number of customers. By ranking the responses in terms of the number of responses per 100 customers, the impact of one category can be compared with another.

For example, from Table 20 the importance of store cleanliness has a greater value to customers in this market area at the time of the survey than store layout. In another area or at another time, the relative relationships of these categories may well change. Indeed, some may disappear and new ones may take their place.

TABLE 18

TEN MOST IMPORTANT CONSIDERATIONS OF CUSTOMERS IN SELECTING A FOOD STORE (Ranked in Order of Importance)

Classification	Relative Importance	Descriptions & Terms Used by Customers
1. General Price Level	43	Consistent, overall, general, price level, prices
2. Store Cleanliness	36	Clean,cleaner, cleanliness
3. Food Quality	34	Good food, dependable, value, best buy, quality
4. Selection & Variety	33	Good selection, variety, choice, complete wide choice, good variety, selection
5. Store Location	33	Short drive, convenient, close to home, nearby
6. Employee Attitude	30	Pleasant, kind, friendly, appearance, courteous, considerate, nice
7. Meat	28	Freshness, quality, well trimmed, lean, choice, good selection
8. Fruits & Vegetables	23	Freshness, not all packaged, appearance, quality, no rotten produce
9. Competitive Prices	14	Reasonable, fair, in line, competitive
10. Store Atmosphere	13	Appearance, general atmosphere, lighting, marked aisles, ease of shopping, organization

*Number of times mentioned per 100 customers.

TABLE 19
Considerations Important to Customers in Selecting a Food Store

Considerations	Relative Importance	Terms Customers Used to Describe:
Store Characteristics		
Location	33	Short drive, convenient, close to home, nearby
Cleanliness	36	Clean, cleaner, cleanliness
Atmosphere	13	Store appearance, general atmosphere, lighting, marked aisles, ease of shopping, organization
Layout	8	Wide aisles, uncrowded, lack of clutter, spacious
Displays	5	Attractive, legible prices, honest labeling
Parking	4	Easy, good, ample
Well stocked	5	Well stocked shelves
Employees & Services		
Employee attitudes	30	Pleasant, kind, friendly, appearance, courteous, considerate, nice
Exit services	8	Good service, carryout, loading help, cheerful assistance
Checkout	2	Efficient, quick, fast, bag boys, ease of checkout
Hours open	2	Convenient, handy
Check cashing	1	Convenient, handy, no questions, no hassle
Pricing, Promotion & Advertising		
General price level	43	Consistent, overall, general, prices
Competitive prices	14	Reasonable, fair, in line, competitive
Specials	6	Bargains, specials, sale items, availability of specials
Low prices	5	Lowest, best, cheap, low, lower
Advertising	3	Available coupons, honest, availability of items
Product Related		
Quality foods	34	Good food, dependable, good value, best buys, quality
Selection & variety	33	Good selection & variety, large, complete, wide choice, variety
Meat freshness & quality	28	Well trimmed, fresh, choice, good selection, variety, quality
Produce freshness & quality	23	Freshness, not all packaged, appearance
Product freshness	8	Up-to-date stock, freshness, fast moving
Brands available	4	Known, national brands, familiar brands
Availability	3	Items there when I shop, shelves not bare
One-stop shopping	2	Can get everything needed in one store, one stop
Bakery-Delicatessen	2	Good bakery & deli, freshness, quality

*Number of times mentioned per one hundred customers.

TABLE 20

Considerations Important to Customers in Selecting a Food Store Ranked in Order of Importance, by Community and Total

Consideration	Relative Importance Measured by Numbers of Times Mentioned Per 100 Customers		
	Stow	Hudson	Total
General price level	45	41	43
Cleanliness of store	34	38	36
Quality of foods	28	38	34
Selection & variety	30	36	33
Store location	27	37	34
Employee attitude	37	25	30
Meat	24	31	28
Produce	18	27	23
Competitive prices	15	13	14
Store atmosphere	18	10	13
Store layout	11	5	8
Services	5	10	8
Product freshness	7	8	8
Checkout	9	4	6
Specials	10	4	6
Low prices	5	5	5
Store displays	6	3	5
Well stocked shelves	8	3	5
Brands available	5	4	4
Parking	6	3	4
Advertising	5	1	3
Product availability	4	3	3
Hours open	1	2	2
One stop shopping	4	1	2
Bakery-delicatessen	1	3	2
Check cashing	2	1	1

When considerations important to customers in selecting a food store are tabulated by stores (Table A), a reading on customer image of that store may be obtained. If a numerical value on any category is, for example, 10 percent above the total market, this store may be viewed by customers as performing in a superior manner in that category. Heinen, for example, has an extremely strong image for quality, selection and variety, meat, produce, services and product freshness. Cardinal's image is especially favorable in employee attitude, meats, and checkout. Acme (Hudson) has location advantages and a favorable quality image. Of all the stores in the area, Co-op would seem to have the "best" image for price.

This kind of grouping of customer responses by stores has some value in demonstrating that food stores are competitive over a much more complex set of values than may be ordinarily considered. The concept may be useful to store managers in developing a competitive strategy, to students in realizing a fuller understanding of competitive forces at work in the marketplace and as a take-off point for further exploration of more precise measurements of customer views of store performance.

TABLE A

Considerations Important to Customers in Selecting a Food Store, by Stores and Total Market*

Consideration	Customers Who Usually Shop: Acme (Hudson)	Click	Sparkle (Stow)	Co-op (Stow)	Fazio	Cardinal	Heinen	Kroger (Stow-Kent)	Sparkle (Twinsburg)	Total Market
General price level	41	36	40	62	56	39	40	60	47	43
Cleanliness of store	39	30	44	28	33	48	40	25	35	35
Quality of foods	41	26	28	33	25	33	48	25	35	34
Selection & variety	33	31	8	33	47	30	48	45	65	33
Store Location	40	21	33	26	22	42	8	35	29	34
Employee attitude	27	29	38	33	31	54	16	35	24	30
Meat	28	27	19	23	31	39	44	15	24	28
Produce	24	23	8	18	28	21	44	5	18	23
Competitive prices	12	17	13	13	3	21	16	10	29	14
re atmosphere	8	14	28	10	28	6	16	10	6	1
Store layout	5	7	15	10	6	9	4	10	8	8
Services	10	4	4	3	11	3	16	5	6	7
Product freshness	7	6	6	18	11	6	12	5	6	[illegible]
Checkout	10	4	4	4	3	6	3	16	5	[illegible]
Specials	2	6	17	10	14	3	4	10	6	6
Low prices	5	10	2	--	3	--	--	5	6	5
Store displays	3	3	4	5	14	3	3	8	5	5
Well stocked	2	9	6	--	11	3	4	10	6	5
Brands available	5	3	6	5	3	3	--	--	--	4
Parking	2	3	8	10	6	3	8	5	6	4
Advertising	1	9	2	--	14	--	--	--	6	3
Product availability	3	4	8	5	6	3	--	--	--	3
Hours open	1	--	--	--	14	--	--	--	6	[illegible]
One-stop shopping	--	7	2	3	--	--	--	5	--	2
Bakery-Delicatessen	2	--	--	--	3	--	8	--	--	2
Check cashing	1	4	2	2	3	--	--	--	--	1

*Numbers indicate number of times consideration is mentioned per 100 customers.

Customers' Rating of Stores Shopped

Customers in the area were asked to rate thirteen areas of stores they shopped: (1) Meat; (2) Fresh fruits and vegetables; (3) Selection of merchandise; (4) Prices; (5) Weekly specials; (6) Convenience of store location; (7) Courtesy and friendliness; (8) Cleanliness and neatness; (9) Ease of shopping in the store; (10) Checkout service; (11) Parking facilities; (12) Availability of advertised specials; (13) In-store bakery. Each store had some areas of strength, each had some weaknesses. The following is a summary of the strengths of each store:

ACME (Hudson)---Convenience of location, employee courtesy.

CLICK---Typically average ratings in most areas.

SPARKLE (Stow)---Meat, prices, location convenience, checkout, easy store to shop.

CO-OP (Stow)---Prices.

FAZIO---Produce, selection of merchandise, weekly specials, in-store bakery.

CARDINAL (Hudson)---Courtesy and friendliness, cleanliness, ease of shopping store, checkout, parking.

HEINEN (Aurora)---Meat, produce, selection of merchandise, cleanliness, ease of shopping, checkout, parking, in-store bakery, availability of advertised specials.

SPARKLE (Twinsburg)---Meat, selection of merchandise, convenience of location, courtesy and friendliness, cleanliness, ease of shopping store, checkout, parking.

Conversely, each of these stores has areas of weakness. It is apparent that customers in the area do have a choice, with some stores performing stronger in some areas than others. These differences in perceived levels of performance are important to customers and are important to store operators.

Customers were asked to rate specific areas of store operations on an A, B, C, D scale, where A is excellent; B is good; C is fair; and D is poor. The form used and the areas of store operations customers were asked to rate is included in the Appendix with the questionnaire used and the letter soliciting customer's cooperation.

These responses were then given a value of A = 4 points; B = 3 points; C = 2 points; and D = 1 point. Customers' ratings were quantified by stores and for the entire market. The results are summarized in Table B. This kind of customer evaluation develops a comparative score between stores for each area rated but does not indicate the relative importance of one rated area compared with another.

Using the same stores as examples as with the store image rating, Heinen appears especially strong in meats, produce, selection of merchandise, cleanliness and in-store bakery. Cardinal strengths are courtesy and friendliness, cleanliness and parking. Acme's strong points are convenience of location and courtesy. This is a very similar list to that developed earlier but tends to lock customer response into the predetermined areas listed to be rated. Tables B-1 through B-8 list these ratings by individual stores and in addition indicate what has been added in the last "other" rating area.

TABLE B: CUSTOMER RATINGS OF STORES SHOPPED: SUMMARY

Stores rated on scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

em	Acme (Hudson)	Click (St.-Kt.)	Sparkle (Stow)	Co-op (Stow)	Fazio (Bath Rd.)	Cardinal (Hudson)	Heinen (Aurora)	Sparkle (Twinsbg.)	Avg.All Stores
eat	3.0	2.7	3.3	2.8	3.0	3.0	3.9	3.3	3.1
esh fruits & vegetables	2.8	3.0	2.9	2.3	3.5	2.4	3.6	3.0	2.9
election of merchandise	2.9	3.0	3.1	2.6	3.6	2.3	3.8	3.3	3.1
ices	2.6	2.6	2.5	2.6	2.7	2.2	2.8	2.8	2.6
eekly specials	2.8	2.9	3.3	2.6	3.4	2.7	2.5	3.0	2.9
onvenience of store location	3.7	2.8	3.7	2.7	2.7	3.2	2.2	3.5	3.1
ourtesy & friendliness	3.5	2.6	3.4	2.7	2.6	3.4	3.3	3.7	3.2
leanliness & neatness	2.7	2.6	3.3	2.3	3.3	3.5	3.9	3.6	3.2
se of shopping in the store	3.0	2.7	3.3	2.3	3.0	3.3	3.9	3.6	3.1
eckout service	2.9	2.4	3.1	2.2	2.4	3.3	3.5	3.2	2.9
rking facilities	3.1	2.9	3.4	1.8	3.4	3.6	3.7	3.5	3.2
ailability of advertised specials	3.2	3.1	3.3	2.8	3.0	3.2	3.5	3.2	3.2
-store bakery	1.8	3.1	2.0	1.3	3.6	2.1	3.6	2.1	2.4
ther (For others see individual store summaries)									

TABLE B-1

CUSTOMER RATING OF STORE SHOPPED: ACME (Hudson)

Store Rated on Scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

Meat	3.0
Fresh fruits & vegetables	2.8
Selection of merchandise	2.9
Prices	2.6
Weekly specials	2.8
Convenience of store location	3.7
Courtesy & friendliness	3.5
Cleanliness & neatness	2.7
Ease of shopping in the store	3.0
Checkout service	2.9
Parking facilities	3.1
Availability of advertised specials	3.2
In-store bakery	1.8

Other:

Package pickup, carryout--1 B, 3 C's, 6 D's
Brands--1 C
Overall rating--1 A
Cart handling--1 D
Deli--5 D's
Shelves stocked--1 C
Fresh fish--3 D's
No coupons--1 C
Bakery items on hand-- 1 B
Store manager--1 A
Damaged merchandise--1 D
Special parking & handling for wheelchair customers--1 A
Unmarked parking--1 D
Specialty items--1 D
Check cashing--3 A's
Use of store for ads of local clubs--1 A
Cleanliness-- 1 D
Parking facility needs trees--1 B
Meats--1 B

TABLE B-2
CUSTOMER RATING OF STORE SHOPPED: CLICK (Stow-Kent)

Store rated on scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

Meat	2.7
Fresh fruits & vegetables	3.0
Selection of merchandise	3.0
Prices	2.6
Weekly specials	2.9
Convenience of store location	2.8
Courtesy & friendliness	2.6
Cleanliness & neatness	2.6
Ease of shopping in the store	2.7
Checkout service	2.4
Parking facilities	2.9
Availability of advertised specials	3.1
In-store bakery	3.1

Other:
Carryout--1 B, 1 C, 2 D's
Shopping carts--2 D's
HBA--1 C
Meat selection & quality--1 B
Delicatessen--1 C

TABLE B-3

CUSTOMER RATING OF STORE SHOPPED: SPARKLE (Stow)

Store rated on scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

Meat	3.3
Fresh fruit & vegetables	2.9
Selection of merchandise	3.1
Prices	2.5
Weekly specials	3.3
Convenience of store location	3.7
Courtesy & friendliness	3.4
Cleanliness & neatness	3.3
Ease of shopping in the store	3.3
Checkout service	3.1
Parking facilities	3.4
Availability of advertised specials	3.3
In-store bakery	2.0
Other:	
Carryout service--2 A's, 1 B	
Bread shelves--1 B	

TABLE B-4

CUSTOMER RATING OF STORE SHOPPED: CO-OP (Stow)

Store rated on scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

Meat	2.8
Fresh fruits & vegetables	2.3
Selection of merchandise	2.6
Prices	2.6
Weekly specials	2.6
Convenience of store location	2.7
Courtesy & friendliness	2.7
Cleanliness and neatness	2.3
Ease of shopping in the store	2.3
Checkout service	2.2
Parking facilities	1.8
Availability of advertised specials	2.8
In-store bakery	1.3
Other:	
Help with groceries--1 B, 1 C, 3 D's	
Poultry--1 A	
Dairy products--1 A	
Consistency--1 A	
Stocked shelves--1 C	

TABLE B-5
CUSTOMER RATING OF STORE SHOPPED: FAZIO (Bath Road)

Store rated on scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

Meat	3.0
Fresh fruits & vegetables	3.5
Selection of merchandise	3.6
Prices	2.7
Weekly specials	3.4
Convenience of store location	2.7
Courtesy & friendliness	2.6
Cleanliness and neatness	3.3
Ease of shopping in the store	3.0
Checkout service	2.4
Parking facilities	3.4
Availability of advertised specials	3.0
In-store bakery	3.6
Other:	
Health & beauty aids--1 A	
Checkout boys--1 D	
Delicatessen--2 B's, 1 A	

TABLE B-6
CUSTOMER RATING OF STORE SHOPPED: CARDINAL (Hudson)

Store rated on scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

	Customers in Hudson	Customers in Stow	Total
Meat	3.0	3.2	3.0
Fresh fruits & vegetables	2.4	2.8	2.4
Selection of merchandise	2.3	2.4	2.3
Prices	2.2	2.2	2.2
Weekly specials	2.7	2.7	2.7
Convenience of store location	3.4	2.7	3.2
Courtesy & friendliness	3.4	3.2	3.4
Cleanliness & neatness	3.5	3.4	3.5
Ease of shopping in the store	3.3	3.3	3.3
Checkout Service	3.3	3.3	3.3
Parking facilities	3.6	3.5	3.6
Availability of advertised specials	3.2	3.1	3.2
In-store bakery	1.6	2.1	1.7

Other:
- Check cashing--1 A
- Price marking--1 C
- Package pick-up & carryout--2 A's, 1 B, 1 C, 2 D's
- HBA--1 C
- Fresh fish--1 D
- Store manager--1 D
- Meats--1 B
- Inventory--1 C
- Damaged merchandise--1 B
- Getting in & out parking lot--1 D
- Checkout boys--1 A
- Delicatessen--1 A, 2 C's
- Bakery items on hand--1 C

TABLE B-7

CUSTOMER RATING OF STORE SHOPPED: HEINEN (Aurora)

Store Rated on Scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

Meat	3.9
Fresh fruits & vegetables	3.6
Selection of merchandise	3.8
Prices	2.8
Weekly specials	2.5
Convenience of store location	2.2
Courtesy & friendliness	3.3
Cleanliness & neatness	3.9
Ease of shopping in the store	3.9
Checkout service	3.5
Parking facilities	3.7
Availability of advertised specials	3.5
In-store bakery	3.6

Other:
- Carryout-pickup--7 A's
- Stock--1 A
- Fish--3 B's
- No coupons, stamps--1 A
- Specialty items--1 A
- Check cashing--1 D
- Shopping atmosphere--1 A
- Cleanliness--1 A
- Bakery items on hand--1 A
- Special handling of wheelchair customers--1 C

TABLE B-8

CUSTOMER RATING OF STORE SHOPPED: SPARKLE (Twinsburg)

Store rated on scale of: A = 4 points
B = 3 points
C = 2 points
D = 1 point

Meat	3.3
Fresh fruits and vegetables	3.0
Selection of merchandise	3.3
Prices	2.8
Weekly specials	3.0
Convenience of store location	3.5
Courtesy & friendliness	3.7
Cleanliness & neatness	3.6
Ease of shopping in the store	3.6
Checkout service	3.2
Parking facilities	3.5
Availability of advertised specials	3.2
In-store bakery	3.1
Other:	
Price marking--1 A	
Delicatessen--2 A's, 2 B's	
Wide selection--1 B	
Money saving specials--1 A	

How Important Are These Ideas?

An additional part of the survey attempted to get a response from customers about the relative importance of five food related issues of current interest. The five issues identified for the customer were:

(1) open code dating of perishable products
(2) unit pricing
(3) all ingredients listed on the package
(4) few chemical additives
(5) nutritional information on the package

Customers were asked to rate how important each of these were on a very important, important, not important scale.

Looking only at the rating "very important" in Table 21, the open code dating was firmly supported with 80.6 percent indicating this was very important. "All ingredients on the package" was rated as very important by an even 50 percent. If the two top ratings (very important and important) are combined, the level of support for all five ideas is indeed substantial.

A more detailed breakdown of ratings is provided in Table 22.

Perhaps at this point it should be pointed out that a level of support indicated for any of these ideas does not indicate that customers will be willing to switch brands for this choice or to change stores because one offers such a choice. The impetus for a change of action is provided by a complex mixture of brand satisfaction, choice or selection, price, package, freshness, quality, convenience and others.

This level of tacit support for these ideas of current interest does indicate, however, that there is a potential for a ground swell of support for voluntary or legislative moves in these areas.

TABLE 21

EXCERPTS FROM SURVEY OF FOOD STORE CUSTOMERS

HOW IMPORTANT ARE THE FOLLOWING IDEAS TO YOU?

Item	Very Important	Important	Not Important	Don't Understand This	No Response
Open Code Dating of Perishable Foods	80.6	16.8	1.40	.8	.4
Unit Pricing	44.0	41.4	8.2	5.8	.6
All Ingredients Listed on the Package	50.0	39.8	8.0	.2	2.4
Few Chemical Additives	45.0	37.0	12.6	1.4	4.0
Nutrition Information on Package	43.6	40.2	11.4	.4	4.4

TABLE 22

HOW IMPORTANT ARE THE FOLLOWING IDEAS TO YOU? (500 Questionnaires)

	Very Important		Important		Not Important		Don't Under-Stand This		No Response	
	No.	%	No.	%	No.	%	No.	%	No.	%
Open Code Dating on Perishable Foods										
Stow	188	83.92	32	14.28	1	.44	2	.89	1	.44
Hudson	215	77.89	52	18.84	6	2.17	2	.72	1	.36
Total	403	80.60	84	16.80	7	1.40	4	.80	2	.40
Unit Pricing										
Stow	90	40.17	100	44.64	21	9.37	12	5.35	1	.44
Hudson	130	47.10	107	38.76	20	7.24	17	6.15	2	.72
Total	220	44.00	207	41.40	41	8.20	29	5.80	3	.60
All Ingredients Listed on Package										
Stow	104	46.42	91	40.62	24	10.71	1	.44	4	1.78
Hudson	146	52.89	108	39.13	16	5.79	0	.00	8	2.89
Total	250	50.00	199	39.80	40	8.00	1	.20	12	2.40
Few Chemical Additives										
Stow	98	43.75	82	36.60	31	13.83	4	1.78	9	4.01
Hudson	127	46.01	103	37.31	32	11.59	3	1.08	11	3.98
Total	225	45.00	185	37.00	63	12.60	7	1.40	20	4.00
Nutritional Information on Package										
Stow	105	46.47	78	34.80	27	12.05	2	.89	12	5.35
Hudson	113	40.94	123	44.56	30	10.86	0	.00	10	3.02
Total	218	43.60	201	40.20	57	11.40	2	.40	22	4.40

COMMENTS: A sizable majority of food store customers in this survey are favorably inclined to the five ideas they were asked about. Open code dating has especially strong support with 80.60 percent of the customers classing this as very important to them. Responses from customers about other ideas of importance to them were concentrated on identification of calorie content of food, legible price marking, cleanliness and freshness of perishables. Calorie content, number of servings and size of servings will be part of the nutritional information on the package required on foods that claim nutritional advantages after January 1, 1975.

CUSTOMER SUGGESTIONS FOR IMPROVEMENT OF FOOD STORES

In a survey of customers of food stores in two communities in northern Ohio in September of 1974, 84 percent of those responding had suggestions for improvement of food stores. Customers were asked to respond to an open-end question "What suggestions would you make to improve food stores?" The responses were classified into similar groups. These groups are listed in the order of the number of times identified by customers. In addition, the comments under each group are also listed in order of frequency of identification.

1. STORE LAYOUT (99 responses)

   Wider and uncluttered aisles, less changing of location of merchandise, better aisle markers, dairy and frozen products at end of shopping pattern, bakery last in shopping route, similar items at same location, a detailed index of item location at store entrance, produce not first in shopping pattern, remove displays from aisles, have new product section, alphabetize cereal and soup displays, more consideration of disabled (wheelchair), coupon items in easy to find places, don't move specials around each week, cross aisle access (present aisles are too long), better displays.

2. PRICING (92 responses)

   Lower prices, legible prices and price marking, don't change prices of items on shelf, price marking not easy to find, monitor prices more closely, more consistent pricing, pricing uniformity between stores, reduce prices on old, outdated stock, price by single package instead of multiples, reasonable prices, special "marked down" counter, more common items with coupons, fewer price changes.

3. CHECKOUT (79 responses)

   Improve faster and quicker checkout time, more clerks at peak hours, eliminate long lines and waiting, better bagging procedures, more bag boys and packers, groceries unloaded by clerk at checkout, availability and enforcement of fast checkout lane, more accurate checkout, special line for those paying by check, cashier check cashing procedure, no cashing of checks at checkout, upgrade clerks, notify cashiers of specials, stronger shopping bags.

4. PRODUCE (66 responses)

Availability of bulk (non-packaged) produce, fresher better produce, over-aged, limp and spoiled produce discounted or removed from display, no packaged produce, improve pre-packaged produce, only fresh produce displayed, packages for one or two people, larger selection, scales available to check weights, lower prices on in-season items, better supply of fresh fruits and vegetables, less packaging to conserve paper, don't display onions next to fruit, hate small onions.

5. STORE FEATURES (47 responses)

Everything in one store (bakery, deli, gourmet), open longer hours, adequate parking, grocery part of one-stop shopping complex, music too loud, public toilets, stores too cold, close on Sunday, remove toys and games from store to make shopping easier for mothers with children, no bubble gum-etc. machines, bottle check-in point for returnables, make shopping more enjoyable for mothers with small children, shopping carts that roll easily, more convenient bottle return to encourage recycling, dairy and meat counter boring--I can shop store blindfolded, packages displayed on top of freezers too high to reach.

6. MEAT (42 responses)

More variety for better selection, see-through meat packaging, more meat cut and packaged to order, better quality meats, freshly cut meats, more fresh and frozen fish, less packaging, better service, discount marginal meats, no padding in packages, change meat displays around, have meat in cases if open on Sundays, old chicken looks fresh when under cellophane, stale meat if sold at all should be discounted, locate meat near end of shopping pattern, more ideas for meat variety, don't put meats away before closing time, service meat counter, standardized names on meat cuts, lower prices, make commercial grade available, "honest" lighting in meat department.

7. CARRYOUT--PACKAGE PICKUP (42 responses)

Better services in loading your car, improve, efficient parcel pick-up, improve carts, larger carts, more carryout help, keep carts away from cars, retrieve carts from parking lot, groceries put in car without begging, better control of loading zone, have boys retrieve carts from parking lot, eliminate package pick-up and resume cart to car policy.

8. CLEANLINESS (38 responses)

Cleaner store, clean up, clean-bright orderly store, stores that smell clean, clean up drinking fountains, clean restrooms.

9. ADVERTISING AND PROMOTION (35 responses)

Availability of advertised specials, prefer low prices to coupons, stop coupons, get rid of stamps and gimmicks, more coupons, feature both before and post food advertised specials,have substitutes for sale items not available, better advertised specials, unprincipled advertising claims, all coupon items in one place, to hell with stamps, advertise in local paper.

10. STOCKING--DISPLAYING (34 responses)

Keep shelves stocked, stock shelves when customers are not shopping, keep cartons out of aisles, stock shelves when store is closed, stock shelves better for Monday shopper, sufficient quantities of coupon and "special" items, remove stale and spoiled items from shelves, keep stock up to date (especially freezers), canned and bottled items stacked too high, longer hours to stock so aisles are not jammed, don't overstock so displays fall over when one item is removed, don't like "jumble" displays.

11. SELECTION & VARIETY (31 responses)

Greater selection of items, more health and natural foods, less duplication of items, more name brands, variety in brands other than store brands, try to get items customers request, more gourmet foods, more complete line of products.

12. LABELING (27 responses)

Clear understandable unit pricing, open code dating on packages, accurate understandable standard dating of dairy and bakery products, list of specific ingredients, post day when fresh fruits and vegetables are received at store, open dating and nutritional information on packages, improve labeling.

13. PACKAGING AND FOOD QUALITY (23 responses)

Fresher dairy products, concentrate on freshness and quality, package for one or two persons, not so much packaging, paper bags wasted-- use baskets as Europeans do, monitor weights and quality, improve packaging, don't add artificial ingredients to food, guarantee food sold, conscientious checking for food quality, all perishable departments of good quality, care in handling of frozen foods, make sure foods are fresh, more consistent quality and price.

14. PEOPLE (20 responses)

Improve courtesy-friendliness of employees, more help, improve personnel, chairs for older people to sit down, assistance in finding items, discipline arguing and socializing employees, improve customer service, fewer employees-lower prices, hire people who want to work and who like people, attendants to return carts from parking lot, don't transfer managers from home community.

ADJUSTMENTS IN FOOD BUYING AS A RESULT OF HIGH RATE OF INFLATION

By the fall of 1974, many families have made adjustments in buying and using foods. Some families have lower real incomes, others find that rapidly rising prices in all family living areas have called for a new look at expenditures and at past habits. Many have become more price sensitive.

A survey returned by 500 households in two communities in northern Ohio in August and September, 1974, indicated that major adjustments have been made and are continuing. Evidence of this adjustment came ahead of the survey with grocery store expenditures increasing less rapidly than food prices. For example, in 1973 grocery store expenditures increased at a rate of 12.6 percent, while the Food At Home Consumer Price Index rose at a rate of 21.3 percent (January 1973 to January 1974).

Those households surveyed indicated five major kinds of adjustments. One tactic was to buy less or buy less of some foods. A second kind of adjustment was to buy more of lower priced, perhaps less desirable, or substitute products and brands. A third group of adjustments reported was a change in other shopping habits and buying changes. A fourth group of adjustments was concerned with growing, storing and preparing foods. And finally, the fifth group of adjustments had to do with home use habits, planning and meal patterns. All of these kinds of changes are interrelated and really cannot be separated from one another.

Those who reported buying less or buying less of some foods identified several groups of foods as well as individual items that are not being purchased or that they are buying in smaller quantities. These are listed in descending order of the number of times they were reported as being purchased in smaller quantities. A companion list similarly arranged indicates foods which homemakers reported buying in greater quantity in shopping changes, in food preparation and in habits and home use.

In each of the following lists, the first group of five adjustments account for a large percentage of the total adjustments identified in the list. For the first four lists, the three adjustments listed at the top account for 50 percent or more of all adjustments in that list.

319 Households Reported Buying Less of These Foods

Snacks--identified as goodies, cookies, candy, pop, chips Convenience and prepared foods Meat Luxury items, frills, extras Steak	This first group accounts for 66% of all adjustments in this list.

High priced, overpriced or expensive items
Bakery items and specialty breads
"Junk" foods
Fresh fruits and vegetables
Beef

Rib roasts and roasts
Package mixes
Frozen foods
Desserts
Chops

Sugar
Perishables
Non-nutritious food
Ready-to-eat cereal
Sugar-coated cereal

Choice meats
Name brand foods
Veal
New items
Ice cream

Dairy products
Beans and rice
Seafood
Canned food
Shrimp

Fat
Veal
Paper towels, cups, etc.
No beer, wine, pop, jelly, fruit juice
Leg of lamb

178 Households Reported Buying More of these Foods

Lower priced, less expensive, leaner meats
Chicken, poultry, turkey, especially when on sale
Ground beef, hamburger, sausage
Day-old bakery products
Store brand, private brands

This first group accounts for 63% of all adjustments in this list.

Fish
Meat substitutes--cheese, eggs
Fresh fruits and vegetables
Less expensive vegetables
Cheaper brands

Tuna fish
Canned foods
Lower grade items
Medium, small, Grade B eggs
Lower priced canned goods

Bargains
Weiners--hot dogs
Bread in quantity
Rice
Artificial sweeteners

Non-meat protein foods
Lower cost protein
Butter
Powdered milk
Reduced price (dark) meat

Bulk produce
Macaroni
Liver
Milk in gallons rather than half gallons
"Coke" in quarts

301 Households Reported Other Shopping & Buying Changes

More specials and "bargains"
Use coupons more
More selective, comparison shopping and watch prices
Buy only necessities
Check prices more thoroughly

This first group accounts for 66% of all adjustments in this list.

Buy "off" brands
Do without extras
Shop smarter--more carefully
Buy at outlet stores
Limit trips to store

Less impulse buying
Less buying ahead
Shop more stores for specials
Buy items in season
Substitute lower cost items

Look for better values
Return product if unsatisfactory
Buying to eliminate leftovers
Whole chicken rather than cut-up
Shop more frequently

Watch money spent on meat
Buying food that can be made into a variety of meals
Use grocery list
Buy from farmers' auction
Buy sugar and flour only on special

Shop closer to home
Buy in smaller quantities
Don't buy what we would like to have
Don't shop around
Avoid larger stores with more selection

Look for meat with less waste
Shop specialty stores
Buy treats, snacks only on sale
Ration ourselves
Keep away from chains with highest earnings

125 Households Reported Changes in Producing, Storage, Preparation

Growing more garden
Preparing more casseroles, soups
Buy on sale and store
More freezing and canning
Buying "freezer" meats

This first group accounts for 74% of all adjustments in this list.

Purchased freezer
Preparing more meat loaves and other ground meat dishes
Use freezer more
Don't stockpile as much
Prepare dish for two meals

More home baking
More time preparing meals
More economical dishes
More creative cooking
More one dish meals

More pasta
Cook less, bake less
Don't make soups
Raise chickens
Look for more recipes with hamburger and chicken
Prices have taken enthusiasm out of cooking

82 Households Changing Habits and Home Use

More effective use of leftovers
Serve smaller portions
Baking and cooking more from scratch
Better planning of meals
Eating less

This first group accounts for 41% of all adjustments in this list.

Fewer meat dishes
Serve smaller portions of meat
Plan meals around specials
Less selection at meals
Budget grocery list

Eat out more
Plan no leftovers
Plan less expensive menus
Never shop when hungry
Plan one week's meals in advance

More concerned with nutrition and balanced meals
Use up leftovers
Less desserts
Plan meals around meat substitutes
Plan meals around "specials"

More inexpensive meat
Don't pay other bills
Less variety in diet
Food shopping has become a drag
Frustrating

Cut non-food luxuries
Fewer restaurant meals
Substitute less expensive items
Use less sugar
More pasta, fewer potatoes

Pancakes, waffles, french toast instead of eggs
Staying home
More salads
Eat more sandwiches

104 Households Reported No Change With Comments

Eat the same; pay more
Don't have to be concerned with price
Always have been a careful shopper

Nutrition comes first, must eat well to live well
Cuts are made elsewhere
We're going to eat what we like while we're here

Got to eat
I like good food
Always have been a hamburger and chicken "junkie"

Always have been a penny pincher
None--yet
Buy only what is essential to health

None, but I am disgusted
Seven girls still have to eat
Income not a restraint , but I worry

At our home we eat to live
I demand good food for my family
I do the best with what I have

CONCERNS ABOUT FOOD

As a part of a survey of food store customers of two communities in northern Ohio during September, 1974, customers were asked "What additional concerns do you have about food quality, availability, freshness, nutritive value, labeling and shelf life?" This question was asked after customers had rated the importance of open code dating, nutritional information on package, chemical additives, ingredient labeling, and unit pricing. This question also was asked after customers had responded with suggestions to improve food stores, and after a question on adjustments in food buying because of a high rate of inflation.

Still 53.8 percent (268 individuals) responded with some expression of concern about food. These concerns have been grouped into 16 categories. These categories are listed in a descending order where the first listed received the largest number of responses. Additionally, the comments within each catagory are also listed in descending order with the first listed receiving the largest number of responses.

The concerns identified with an asterisk are now subject to regulation and some control. Those who are especially concerned about these subjects could investigate to see if these restrictions are adequate, whether the controls are being enforced and whether changes are needed.

1. LABELING (43 responses)

Open dating on packages, labeling with all ingredients to aid those with allergies or restricted diets*, calorie content on label, put producer's name on package not just packager's name, ingredients labeled legibly and in layman's terms, better labeling, actual weight of canned vegetables before liquid is added, date milk-cheese-meat, source of out of season foods, grades on all foods, quantity in cups listed, list nutritive value and preservatives added, weight information on label*, information on shelf life of non-perishables, honest ingredient labeling*, dry weight of packaged food, identify manufacturer on private or store label, canned and frozen foods dated with processing date and expiration date, dated fresh dairy products, truthfulness*, the more information the better customers can select, making shoppers more aware of how to read labels, there is a better overall labeling system on dog food than on food for the family.

2. PRICING (37 responses)

Objection to increasing prices of items on the grocery shelf, prices too high, desire unit pricing, prices marked clearly, lower prices on meat and vegetables, discontinue coupons, identify specials in store, consistent progressive price increases without any apparent method of checking, when old items are marked down the price tag covers the expiration date, lower prices on older food, prices so high quality ought to be the best, pricing, prices of sugar are incredible.

3. PRODUCE (36 responses)

Prefer non-packaged (bulk) produce, lack of freshness, some spoilage in too many pre-packaged items, spoiled fresh fruits and vegetables on display, fruit looks good on outside but not always good on inside, more diversity in vegetables, won't buy pre-packaged produce any more, open dating on fruits and vegetables, lack of quality, many produce items preserved and stored too long--looks good-tastes terrible, fresh fruit not ripe, lack of availability in stores of locally grown produce, keeping shelves stocked with fresh produce, additives (sprays) should be indicated*, stale produce should be marked down, concerned about price differences for lettuce from store to store.

4. FRESHNESS (33 responses)

Freshness, store is responsible for freshness and safety*, outdated and spoiled food should not be sold, in large stores shelves aren't checked often enough for out of date products,coupon items often are not fresh, foods lose vitamins as they age, cake mixes often old, stock shelves so that new cans are separate from old, any food with shelf life of over one year can't be good*, baked goods should be fresh, bread a problem-used to be able to freeze and was fresh when defrosted-not now, many stores still sell food past date, freshness is important with food prices so high, found a Christmas cookie recipe in a bag of flour in August, expiration date on cheese and luncheon meat often too long-they spoil before date, canned goods with rusted lids should be removed from shelf, lack of rotation of shelf stock, more dating of boxed foods, about shelf life of salad dressings and cereals, freshness of lettuce and bread and meat, coffee often stale or past expiration date, too many canned goods have unknown shelf life, shelf life of canned goods, overage mushrooms, how long products have been on shelf, clear-understandable open dating, all food coded for freshness, foods frozen by store and displayed as fresh should be identified, bread is coded two-three days ahead.

5. MEAT (30 responses)

Want to see both sides of cut, standardize meat cut names, dates on meat, no colored lights above meat counter*, label meat according to grade (if it isn't choice I'd like to know), more diversity in meat selection, include complete descriptions of grade and cut, less water in meat*, some way to tell quality and cut of meat*, specific information on hot dogs and canned meats*, lack of availability of kidneys-hearts and fresh sides, ground meat high in fats, give percent of fats in ground meat, identify meats previously frozen, more meat variety, quality, prohibit coloring of meats*, DES in meats*, additives and nitrites in luncheon meats*, old ground meat buried under layer of new in package.

6. QUALITY--VALUE (21 responses)

Food quality has been declining, quality, stale foods, packaged/canned items should be in good condition, house brand often inferior in quality, prices have increased and package quantities have decreased, quality of canned food has declined, produce should be of good quality, food should be edible and fresh, quality of flour-bread doesn't raise right in oven, jar packed (jelly, baby food, peanut butter) products are too easily opened and tampered with on store shelf, best possible food for choice, can't determine quality or freshness from label, more interested in quality than in price, moldy cheese, stores should buy locally to insure high quality.

7. ADDITIVES (18 responses)

Too many additives*, more information on additives (what is BHT?), too much sugar in cereals, concern about chemical preservatives and what effect they have on us*, additives should be printed in capitals on wrapper with their side effects, too many fillers, purpose and meaning of chemicals, less preservatives and more emphasis on nutrition, shorter shelf life preferable to additives, concern about reliability and safety of additives*, concern about additives, sprays and hormones given animals*, nutrients in foods being replaced by chemicals, DES is harmful*, carcigenous pesticides seem ubiquitous.*

8. PACKAGING (17 responses)

Clear packaging for meats to see both sides, too many dented cans, false weights*, uniform quantities, packaging strong enough to go directly to freezer, deceit in packaging-looks nice on top but bruised and damaged underneath, spend less on fancy packaging, not used to packaging, package for single person households, concern about PVC in packaging, packaging meat to see bottom is silly, standardize sizes and boxes, too much packaging, increasing use of non-biodegradable wrappings (plastic and styrofoam).

9. NUTRITIVE VALUE (16 responses)

More information on nutritive value*, nutritive loss in food processing and shipping, nutrition important for good health, would like to see consumers made aware of nutritive value of food items, too many sweetened cereals, lack of food value in some convenience foods, more whole grain cereals, too little protein in advertised cereals, over-processing of food, nutritive value of cereals*, back to "natural" sugar - flour - bread, too much junk food available, nutritive value of processed goods very poor*, the store should not have to teach nutrition.

10. SELECTION--AVAILABILITY (15 responses)

Specials not available when advertised, don't like substitution of store brands for national brands, more variety for better selection, choice not varied enough, poor availability of some products, more brands for greater selection, new products not available after being advertised*, empty shelves in wanted sizes, produce items such as cheese-veal and lamb not available many times, bread coded 2-3 days ahead, store is responsible for freshness and safety*, don't like store brands-poor quality, frightening to see shortages (tiolet paper and canning lids).

11. DAIRY PRODUCTS (11 responses)

Freshness, date dairy products, dairy products not rotated to insure freshness, sometimes sour or moldy, stricter control of dairy product shelf life, outdated foods in refrigerated cases, freshness of cheese and all dairy items, clear shelf life labeling of milk and dairy products, should be ready to sell when store opens.

12. CLEANLINESS (8 responses)

Dented, dirty canned goods, clean store, cleanliness of meat counter*, concern about foreign substances (animal droppings) in packaged foods.

13. FROZEN FOOD (6 responses)

Date frozen food, in-store handling of frozens and perishables, assurance that frozen foods have been properly maintained, outdated foods, refrigeration in store for foods not working properly, how many times have vegetables and fish been thawed and refrozen.

14. FOOD SAFETY (6 responses)

Possible bacterial contamination of canned foods*, spoiled (moldy) foods, too much spraying of pesticides in store*, want to know if foods were chemically sprayed when grown and what chemicals were used.

15. ADVERTISING (3 responses)

Do away with all promotion gimmicks and lower prices, false and misleading advertisements on package and TV*, why do they say 4/$1 and call it a sale and charge 25¢ each when not on sale.

16. REGULATORY (3 responses)

I like to feel that the Food & Drug Administration is on its toes protecting what I buy, inadequate government regulation and inspecting, more comparative studies of brands like Consumer Guide.

Conclusions

Customers of this area do have a choice between stores offering a different "marketing mix."

There are significant differences in food store customer expectations between these two communities, shaped by characteristics of the communities themselves and the stores serving these communities.

Some stores are significantly more successful in implementing programs that have acceptable "customer ratings" in the top ten categories than others.

Customers, individually and as a group, are possessed of a great divergence of priorities. Any one store would find it difficult to meet all of these individual priorities.

Customers indicated that every store in the market had some specific areas that failed to meet their expectations and likewise each had areas of strength. Action related to many areas of concern expressed by customers (such as labeling) will need to take place for most products at the point of manufacture or processing. That is to say, the whole marketing system is involved in trying to meet these customer expectations.

Most families have made some adjustments in food buying as a result of high rates of inflation.

There is a potentially solid support for such ideas as open code dating of perishables, unit pricing, nutrition labeling, ingredient labeling and limiting food additives.

Supermarkets are competitive over a much more complex set of values than ordinarily considered.

Customers of supermarkets in this survey placed strong emphasis on price, cleanliness, food quality, selection and variety, store location, employee attitude, meat, produce, and store atmosphere. In addition, customers indicated some 15 other considerations which are also important to them when selecting a food store.

APPENDIX

August 1, 1974

To: Selected Food Store Customers in the Hudson-Stow Area

Food quality, prices, packaging, ingredients, convenience, selection of brands, employee courtesy, cleanliness, freshness and many other items are of some importance to most food store customers. May I ask you to help me learn about your views and values and what is important to you when buying food?

The results of this survey should be useful to students of our food marketing system, to consumers, and to managers of stores as they seek to better serve their customers.

The rapid change in food prices during the past several months has altered traditional food buying habits. This survey will measure the importance of some of these changes in your area as you choose stores in which to shop.

The Hudson-Stow area represents a good cross-section of Ohio's food store customers. You have been included in the survey as a resident of this area.

You do not need to identify yourself on the questionnaire. However, if you wish to receive a copy of the survey results, please write your name and address on the back of the last page of the survey. A self-addressed, postage paid envelope is attached for your convenience in returning the questionnaire.

I would like to express my thanks to you for your consideration and, hopefully, your cooperation in completing the enclosed questionnaire and returning it to me soon.

Sincerely,

Ed Watkins

Ed Watkins
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Columbus, Ohio 43210

______Food Stores________

OHIO STATE UNIVERSITY MARKET SURVEY

1. Where do you buy most of your food?

STORE NAME__________________________LOCATION____________________________

2. What other food store do you most frequently shop in?

STORE NAME__________________________LOCATION____________________________

3. Where do you buy <u>most</u> of your meats?

STORE NAME__________________________LOCATION____________________________

4. Where do you buy <u>most</u> of your fresh fruits and vegetables?

STORE NAME__________________________LOCATION____________________________

5. Who does the food shopping for your household? (Please check one.)

WIFE______ HUSBAND______ BOTH______ OTHER__________

6. What is the total number of people in your household?__________________________

7. What is the age of the person who does the food shopping? (Please check one.)

UNDER 30 _____ 30-45_____ 46-60 _____ OVER 60______

8. What is the occupation of the head of your household?

____

9. How far is your home from where you most frequently shop?____________MILES

10. If a friend asked your advice on the best place to buy food, what store would you suggest?

STORE NAME__________________________LOCATION____________________________

11. What considerations are the most important to you in selecting a food store?

____

____

(continued)

12. How much does the courtesy and personality of food store employees influence your choice of where to shop?

____

____

13. What is your approximate family income? (Please check one.)

Under $4,000	______	$16,000 - 20,000	______
$4,000-8,000	______	Over $20,000	______
$8,000-12,000	______		
$12,000-16,000	______		

14. About how much do you spend each week in food stores? $____________

15. What suggestions would you make to improve food stores?

____

____

16. How important are the following ideas to you? (Please check).

	Very Important	Important	Not Important	Don't Understand This
Open code dating of perishable foods				
Unit pricing				
All ingredients listed on the package				
Few chemical additives				
Nutritional information on package				
Other (identify)__________				

17. What additional concerns do you have about food quality, availability, freshness, nutritive value, labeling or shelf-life?

____

____

18. What changes or adjustments have you made in your food buying as a result of recent high rates of inflation?

____

____

Please rate the food stores where you shop, based on your impressions of them. Please use the rating system below.

EXAMPLE:
(A) Excellent
(B) Good
(C) Fair
(D) Poor

Please circle A, B, C, or D for each rating

	Acme	Cardinal	Click
Parking	A B C D	A B C D	A B C D

Please write in the name of the food store you usually shop, if not mentioned.

	Acme	Cardinal	Click	Co-op	
Meat	A B C D	A B C D	A B C D	A B C D	A B C D
Fresh fruits & vegetables	A B C D	A B C D	A B C D	A B C D	A B C D
Selection of merchandise	A B C D	A B C D	A B C D	A B C D	A B C D
Prices	A B C D	A B C D	A B C D	A B C D	A B C D
Weekly Specials	A B C D	A B C D	A B C D	A B C D	A B C D
Convenience of store location	A B C D	A B C D	A B C D	A B C D	A B C D
Courtesy & friendliness	A B C D	A B C D	A B C D	A B C D	A B C D
Cleanliness and neatness	A B C D	A B C D	A B C D	A B C D	A B C D
Ease of shopping in the store	A B C D	A B C D	A B C D	A B C D	A B C D
Checkout service	A B C D	A B C D	A B C D	A B C D	A B C D
Parking facilities	A B C D	A B C D	A B C D	A B C D	A B C D
Availability of Advertised Specials	A B C D	A B C D	A B C D	A B C D	A B C D
In-store bakery	A B C D	A B C D	A B C D	A B C D	A B C D
Other-(identify)	A B C D	A B C D	A B C D	A B C D	A B C D

THE ENCLOSED ENVELOPE <u>DOES NOT</u> REQUIRE POSTAGE.

Thank you for taking your time to respond to our request for information.